

Administration

General Administration
PoliciesOfficial Visits and
Meetings**PURPOSE:**

- .01 This subject provides guidance on appropriate arrangements for distinguished visitors, Laboratory colloquia, meetings, conferences, and other official Laboratory functions. The subject also provides information on meeting facilities, transportation services, food services, and other resources available for formal or informal meetings and conferences.

PROTOCOL SUPPORT:

- .02 Protocol provides planning and logistical support for Distinguished Visitors, Laboratory colloquia, meetings, conferences, and special events such as dedications and Women's History Week activities. Protocol provides support only for Distinguished Visitors as defined in [AM 616](#); however, exceptions may be made based on a visitor's impact on Laboratory programs or funding. Protocol determines whether a visit qualifies for Protocol support.
- .03 At the request of the technical host, Protocol may assign a Protocol Coordinator to work directly with the Laboratory technical host of a visit or meeting. When assigned, the Protocol Coordinator assists with planning; developing agendas; identifying and contacting presenters; writing and distributing notification memos and approval requests; conducting registration of participants; developing packets of information materials; making logistical arrangements (lodging, meals, refreshments, receptions, meeting rooms, audiovisual equipment, transportation, tours, etc.); preparing and distributing name tags; coordinating security and clearances; and any special arrangements unique to the event. There is no charge to host groups for Protocol services.

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| How to Obtain Support | .04 | Contact Protocol (7-6574) to obtain guidance and support for receptions, Laboratory colloquia, meetings and conferences, Distinguished Visitors, and special events. Contact Foodservices (7-4628) to reserve Otowi cafeteria dining rooms, to obtain food services for informal meetings or other events for which there is no Protocol Coordinator, or to purchase refreshments on a carryout basis. |
| Clearinghouse for Distinguished Visits | .05 | Protocol serves as a clearinghouse for all distinguished visits and provides the Executive Board (EB) and other appropriate Laboratory personnel with a weekly list of visitors. Protocol also posts a list of visitors (if the hosts concur) on the INFORM Information Access System. |
| DOE Reporting | .06 | Protocol prepares and submits to the Department of Energy (DOE) weekly and quarterly reports on conference activities throughout the Laboratory. |
| REPORTING REQUIREMENTS FOR TECHNICAL HOSTS: | .07 | <p>So that Protocol can satisfy its clearinghouse and DOE reporting responsibilities (<i>see</i> .05 and .06), technical hosts must notify Protocol in advance of any upcoming</p> <ul style="list-style-type: none"> Visit from a Distinguished Visitor; Meeting or conference that involves 5 or more outside visitors; Meeting or conference that has a total estimated cost of \$50,000 or more or that will have 25 or more DOE or DOE-contractor employees in attendance. <i>See</i> .10. |
| LABORATORY COLLOQUIA: | .08 | Laboratory colloquia present high-quality speakers who stimulate thought by providing information on their scientific or technical areas of expertise or their roles as makers of public policy. The Colloquium Committee reviews requests for colloquium speakers and topics, coordinates the dates of approved presentations, and issues invitations to speakers. Colloquia speakers who are eligible for payment may receive an honorarium. The Protocol Office assists the Committee in planning Colloquia. |

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MEETINGS AND CONFERENCES:

Policy

- .09 In accordance with DOE Order 1130.7, Laboratory-hosted meetings and conferences must be in the Laboratory's best interest, economical, and held in government facilities whenever possible.

DOE Approval for Meetings and Conferences

- .10 Nontechnical Laboratory-sponsored meetings and conferences require the advance approval of DOE, as follows:
- If a conference has a total estimated cost of \$200,000 or more or if 100 or more DOE and DOE-contractor employees will attend, approval must be obtained from the DOE Assistant Secretary for Management and Administration. A minimum of 6 months' lead time is required.
- If total estimated conference cost is at least \$100,000 but less than \$200,000 or if 50 to 99 DOE and DOE-contractor employees will attend, approval must be obtained from the cognizant DOE Operations Office Manager. Six months' lead time should be allowed whenever possible.
- NOTE:** The following types of meetings do not require DOE approval: Advisory Committee Meetings; technical program/project reviews; technical symposia, workshops, meetings, or seminars; and any meetings related to non-DOE funded work.

Protocol provides guidance in obtaining the necessary DOE approvals.

Funding of Meetings and Conferences

- .11 Meetings and conferences are usually funded through charge-back to the appropriate program code and/or special meeting account of the hosting cost center(s). All meetings must be supported by participant registration fees and/or appropriate program or operating funding. Meetings funded by the Laboratory must support technical or administrative interests or activities generally regarded as part of DOE programs or Laboratory

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interests. To ensure that monies received from participants are handled according to DOE and University of California requirements, technical hosts must contact Protocol or the General Accounting Group (CFO-1) for guidance whenever a function will be funded wholly or partially through participant fees. *See the [Financial Management Handbook](#).*

Funding of Entertainment Expenses

- .12 Entertainment or alcoholic beverage funding may only be provided (1) from the Director's Administrative Fund or (2) from registration fees collected with specific notification to attendants of that portion which is for entertainment or alcoholic beverages expenses. Participant fees may only be used to fund alcoholic beverages at events held off site. DOE program funds may not be used for entertainment or alcoholic beverages. Therefore, the Laboratory will not reimburse its employees for the portion of a registration fee that is used for entertainment.

NOTE: Entertainment, as used above, is any activity provided for amusement, such as fees for bands or entertainers, cost of alcoholic beverages, or cost of transportation or tickets to concerts or sporting events.

Funding of Expenses for Invited Speakers

- .13 The Laboratory may pay travel and subsistence expenses for speakers invited to scheduled meetings, conferences, and division seminars. The hosting division-level manager must submit an Invitation Request form (Form 910) to the Consultant and Affiliate Services Section of the Staffing Group (HR-S). *See [AM 1202](#).* Hosts may request Director's Administrative Fund support for any entertainment expenses; prior written approval of the Director is required. *See [.18](#).*

Attendance at Local Meetings

- .14 The Laboratory may pay registration or other fees for meetings held in Los Alamos County, if attendance is approved by a group-level manager. Supervisors are expected to apply the same degree of judgment in approving employee attendance at local meetings as would be applied to meetings requiring travel.

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WORKING MEALS:

- .15 Working meals may be charged to the host group's funds, with prior written approval of the cognizant Associate Director, when

The meal is held in Laboratory offices or in the conference room where the meeting is located (not in the Otowi Cafeteria main dining room);

The meal is catered by the cafeteria;

A reasonable fraction of the attendants are outside participants; and

The use of a mealtime is necessary for the completion of business.

- .16 Pickup and delivery of lunches/breakfasts must be arranged by the host group. Working meals may also be purchased directly through the cafeteria or from local businesses, if paid for by attendants as part of conference expenses.

ORGANIZATIONAL RETREATS:

- .17 With prior approval of the cognizant directorate-level management, intra- or interdivision meetings may be held for such purposes as program or organizational planning and budget planning and review. Allowable expenses for retreat sessions will be charged to the organization(s) involved. See [.12](#).

ADMINISTRATIVE FUND:

- .18 The Regents of the University of California provide the Director with an Administrative Fund for special purposes. One use is providing appropriate food services for distinguished visits and special meetings. Charges against the Fund must have prior written approval of the Director's office (*see [.20](#) for exceptions*). All requests to use the Administrative Fund must be routed through the cognizant Associate Director (AD) for recommendation before going to the Director for approval. Technical hosts are responsible for choosing the most appropriate type of function, while minimizing the charge to the Administrative Fund. Laboratory facilities, rather than commercial ones, should be used for entertaining visitors whenever possible.

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Use of Director's Fund for Meals

- .19 Use of the Director's Fund for meals is normally limited to special on-site catered luncheons or dinners. Such meals are served at Otowi Cafeteria or at University House.
- .20 Meal expenses (restaurant or private home) for special visitors may, at times, be reimbursed from the Fund. If the Laboratory host is a division-level manager or above, up to \$50 may be reimbursed without the Director's prior approval. Amounts exceeding \$50 may be authorized with prior approval. For hosts other than those specified above, prior approval is always required, regardless of the amount of reimbursement requested.

Receptions

- .21 The Director may authorize use of the Administrative Fund for a reception in connection with an official visit, meeting, or conference to be held at the Laboratory. Because receptions are less expensive per person than more elaborate forms of entertainment, they are more likely to receive approval. Spouses or domestic partners are normally not included unless visiting spouses or domestic partners are attending. Director's Office approval is required for justified exceptions to the restriction on spouse's or domestic partner's attendance.
- .22 Before requesting Director's Office approval for funding of a reception, consult Protocol (CER-1) to determine the appropriate type of reception.

FACILITIES:

Scheduling Events

- .23 Laboratory meeting facilities may be used only for Laboratory-related meetings and visits. Foodservices must be contacted to schedule events in the Otowi Cafeteria private dining rooms. Protocol must be contacted to schedule events at the J. Robert Oppenheimer Study Center or the University House.

Director's Office

- .24 Advance approval of the Director's Office is

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Approval

required for a meeting held in the Study Center or University House, if the meeting is outside of normal working hours or if it extends beyond one day. CER-1 obtains this approval.

Oppenheimer Study Center

- .25 The J. Robert Oppenheimer Study Center is available for conferences, meetings, and receptions when

A written product or interim report will be produced in whole or part by the participants while at Los Alamos; or

People outside the Laboratory are involved in the function; or

Group interaction is required and other facilities cannot adequately accommodate the number of participants.

NOTE: The Oppenheimer Study Center comfortably accommodates up to 150 people.

- .26 Small conference rooms for 20 or fewer people may also be available at the Study Center.

University House

- .27 The University House was designed to accommodate small informal meetings, receptions, or other functions. The number of attendants should be limited to 20 for meetings, 24 for sit-down meals or buffets, and 50 for receptions.

Otowi Private Dining Rooms

- .28 Three private dining rooms are available at the Otowi Cafeteria for Foodservices functions in support of Laboratory meetings and visits. These rooms are not equipped or appropriate as regular meeting rooms.

TRANSPORTATION:

Flights

- .29 When CER-1 support is used, CER-1 will arrange air reservations and ground transportation for Distinguished Visitors and meeting participants.

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Visitor travel at Laboratory expense requires the prior approval of division-level management.

- .30 Two reservation categories are used for flights: official is for visitors whose travel costs will be paid by the Laboratory, and revenue is for visitors who pay their own air transportation.

Buses

- .31 Use of buses for transporting Laboratory visitors or workshop participants must be arranged through Protocol. The host group will be recharged for bus service. Director's Office approval is required for transportation to Laboratory-hosted meetings, conferences, or workshops located outside Los Alamos County boundaries. (This restriction does not apply to the Fenton Hill Geothermal site or to Bandelier National Monument.) For additional information on transportation, *see the [Travel Home Page](#)*.

REFRESHMENTS FOR MEETINGS:

- .32 Refreshments may be ordered, with prior approval of the host group-level manager or above, for meetings that involve outside participants or that are interdivisional. Refreshment expenses have specific dollar limits, one amount for the first day and a lower amount for any succeeding day. Call Foodservices to determine the current limits. Requests that exceed the limits require the approval of the appropriate division-level manager. These restrictions do not apply to meetings or conferences funded through fee assessments to participants.

Delivery of Refreshments

- .33 Foodservices caters events held in the Study Center, University House, or Otowi dining rooms (see .28). Foodservices also delivers refreshments and supplies to the SM-43 (Administration Building), SM-215 (Physics Auditorium), Health Research Laboratory, and LAMPF auditoriums, but only for meetings involving at least 50 people. The host group is responsible for setting up the coffee and accessories, cleaning up, and notifying Foodservices when the equipment is ready for pickup. In all other cases, the host group is responsible for picking up equipment and supplies and for returning clean equipment.

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- TOURS:** .34 As a part of CER-1's support to meetings and distinguished visits, Protocol will schedule tours of appropriate technical facilities, with approval of the technical site manager.
- HOTELS:** .35 CER-1 will reserve hotel rooms for Distinguished Visitors and will provide lodging assistance for meetings and conferences to be held off site (see [.12](#)).
- CLEARANCE AND SECURITY ARRANGEMENTS:** .36 CER-1 works with the Security and Safeguards Division (S) to coordinate appropriate security arrangements, depending on the category of information involved in a visit, meeting, or conference.